

User Guide

Mobile Configurator



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1. Introduction

The Mobile Configurator is a configuration tool for CRM4Mobile and CRMGadget for Android. The mobile configurator is used to customize layouts according to your companies needs. You can create layouts per object, define action buttons, activate or inactivate objects. The final layout can be exported to an XML file and uploaded to Oracle CRM on Demand as client side extension. During the sync the mobile application reads the configuration file and applies the layout to the application.

2. Installation

You need to have the latest version of Adobe AIR installed on your computer in order to use the mobile configurator. You can download Adobe AIR for your operation system from the Adobe webpage using the following link (<http://get.adobe.com/air>)

To Install the Mobile Configurator follow the steps below

1. Double-click on the installer file “MobileConfigurator-vX.X.air

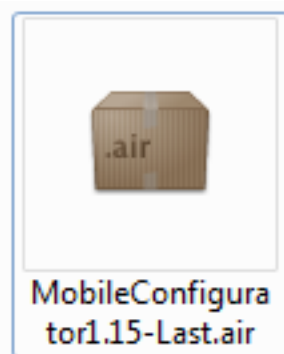


Figure 1-Installer File

2. Click “Install”

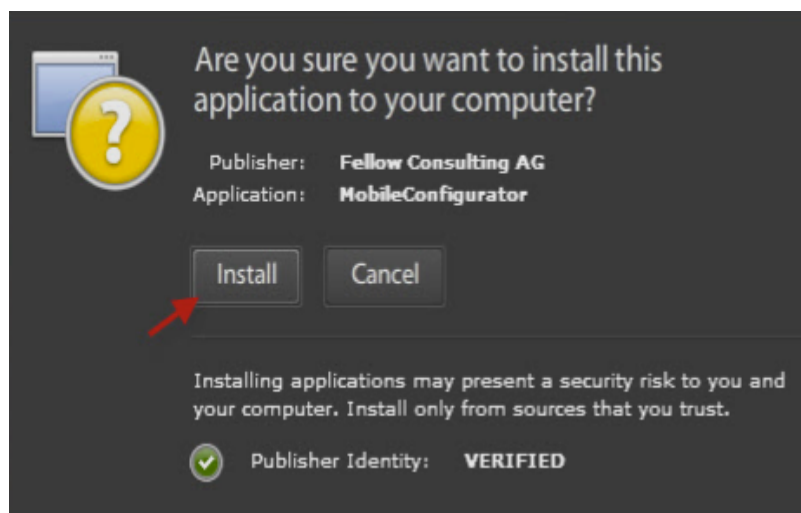


Figure 2-Application installer window

3. Click “Continue“

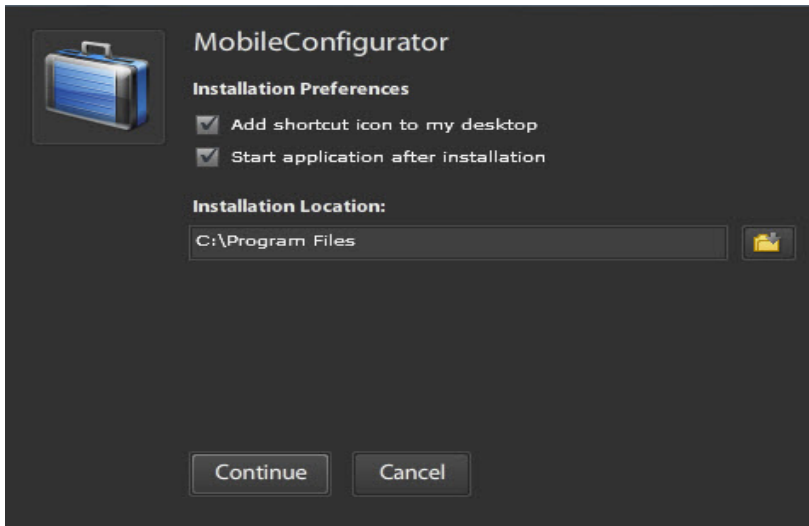


Figure 3-Application installer location window

After the installation finished you will see the icon of the Mobile Configurator on your desktop. Click on it to run the application

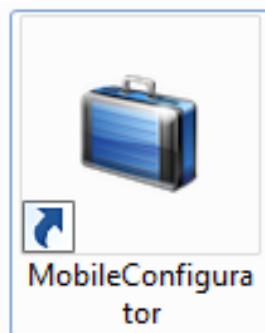


Figure 4-Application icon

4. After launching the application the start screen shows up

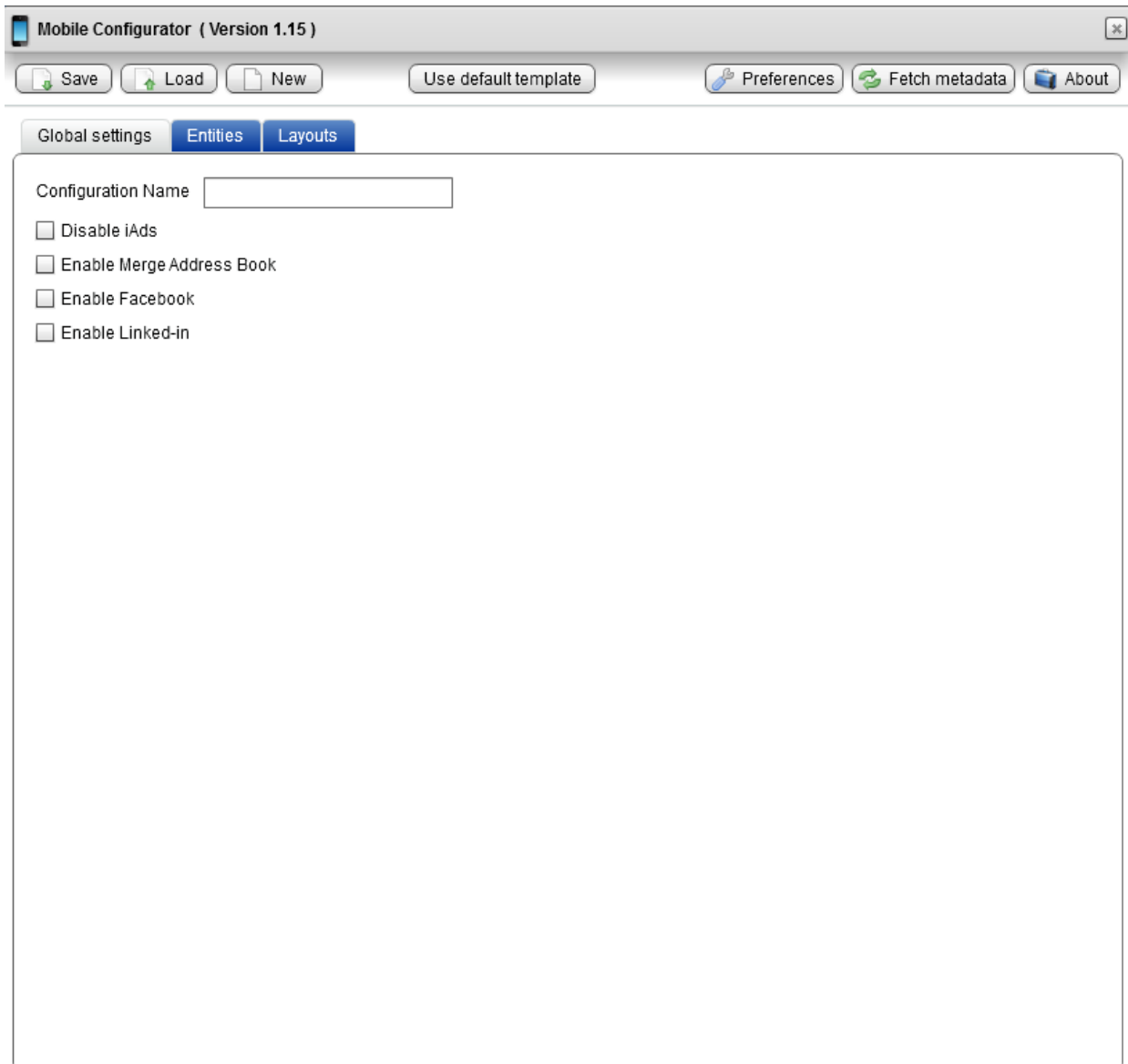


Figure 5-Main screen

3. Automatic Update

The update message alerts when there is newer version of mobile configurator is published. Users can update their older version to newer version just one click on Download now button. After update file is downloaded, you need to install to replace the old one. New version of mobile configurator is important for user with new version of CRM for Mobile such as, CRM for iPhone, iPad and Android.

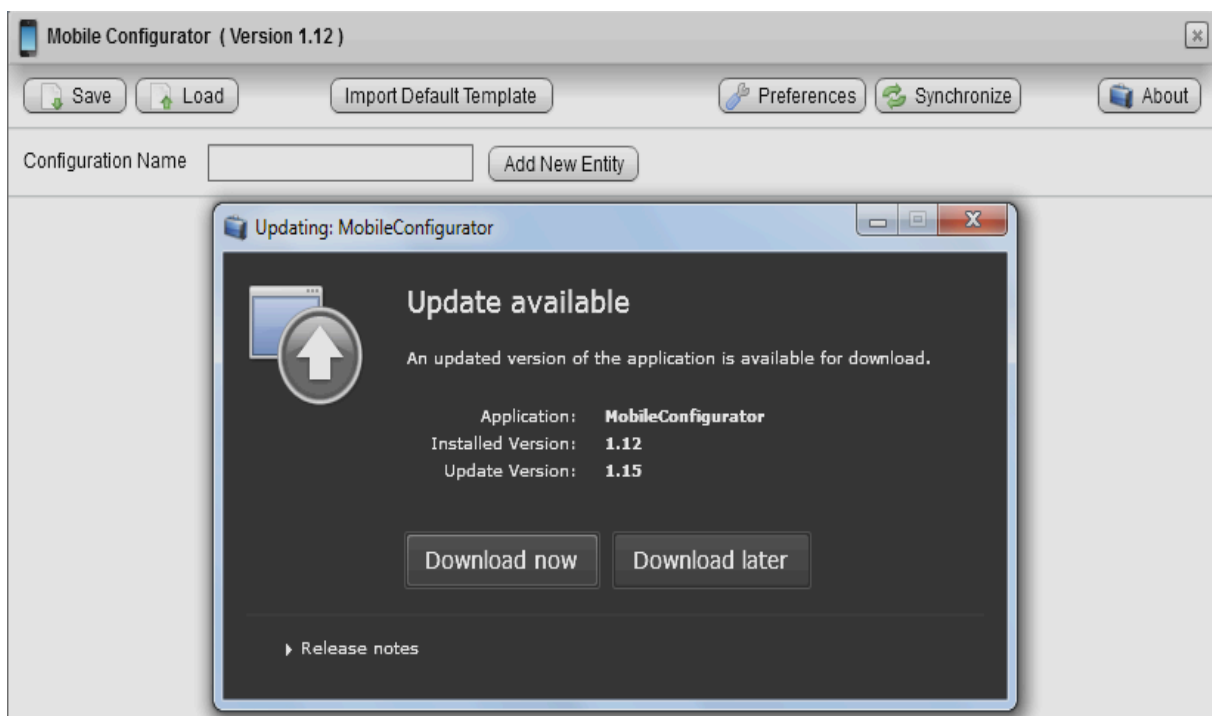


Figure 6-Update Alert Message

4. User Manual

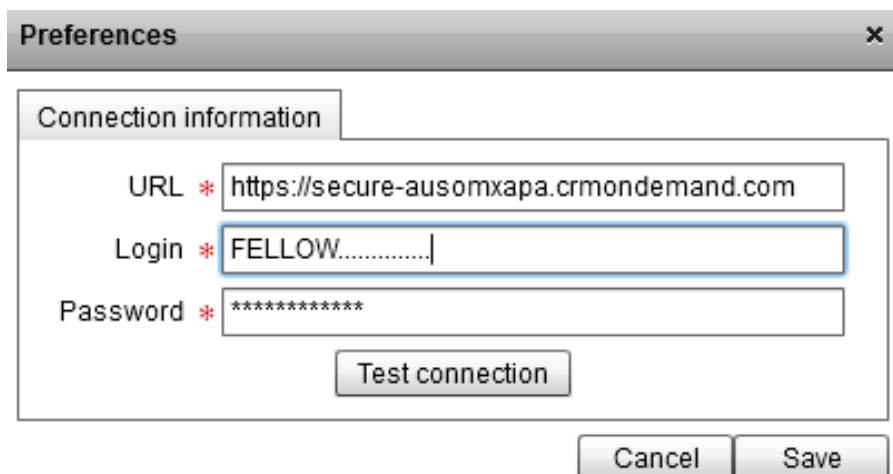
4.1. Application Overview

Icons, Buttons	Icons & Button Description
	After adding fields to workspace you can click the Save button to export the XML file
	Use the load button to import a previously created configuration
	There are four templates of xml in this default 1. iPhone/iPad Default 2. iPhone/iPadConsumer goods 3. Adroid Default 4. Android Consumer goods
	Click on Preferences button to enter your login information
	Synchronize like custom fields, field translation, and so on
	Click the About button to view the version of the application
Configuration Name default_configurator	Name of the configuration. This is also used when exporting the configuration.
	Click add new layout to add more objects and design the layout on those objects
	Click Delete Layout button if you Added New Layout wrongly
Layout depend on field	Dropdown to choose the field that entity depends on
	Click Entities to see all objects. In each object, we can configure in different ways, Enable entity, Choosing filter, allow user to Update, Delete and

Global settings	Create. Global Setting has several configuration items for user to configure. They are: Configuration name, Disable iAds, Enable Merge Address book, Enable Facebook and Enable Linked-In
Filter Personal	Dropdown to choose the Synchronization filter
☐ Disable iAds	iAds is automatically enable, tick Disable iAds checkbox to disable
☐ Enable Merge Address Book	Checkbox to enable or disable Merge address book
☐ Enable Facebook	Checkbox to enable or disable Facebook
☐ Enable Linked-in	Checkbox to enable or disable Linked-In
Layouts	Click Layout button to design your XML. Layouts can be work on unless Entities is enable
Preview 	Preview buttons for the different devices - on the left is android - on the right is iPad - in the middle is iPhone
Detail Layout	Click on Detail Layout to customize the detail pages per entity
List Layout	Click on List Layout to customize the lists per entity
Fields	Press the Fields button to view all available fields of the selected entity (you need to sync first to see all customized fields!)
Actions	Press the Actions button to view all available actions for each object

4.2. Preferences & Fetch Meta data

Set up your preferences before you start with the configuration. Click on Preferences opens a Popup window. Here you can enter your CRM on Demand login information and the CRM on Demand URL. Press Test Login button to test your connection to the server. You can close the popup by clicking the little X on the top right.



The screenshot shows a 'Preferences' dialog box with a close button (X) in the top right corner. Inside the dialog, there is a tab labeled 'Connection information'. Below the tab, there are three input fields: 'URL' with the value 'https://secure-ausomxapa.crmondemand.com', 'Login' with the value 'FELLOW.....', and 'Password' with the value '*****'. Each field is preceded by a red asterisk. Below these fields is a 'Test connection' button. At the bottom of the dialog are 'Cancel' and 'Save' buttons.

Figure 7-Preferences interface

Next, click on Synchronize button. This will download all the custom fields, fields translations, and so on from your CRM on Demand.

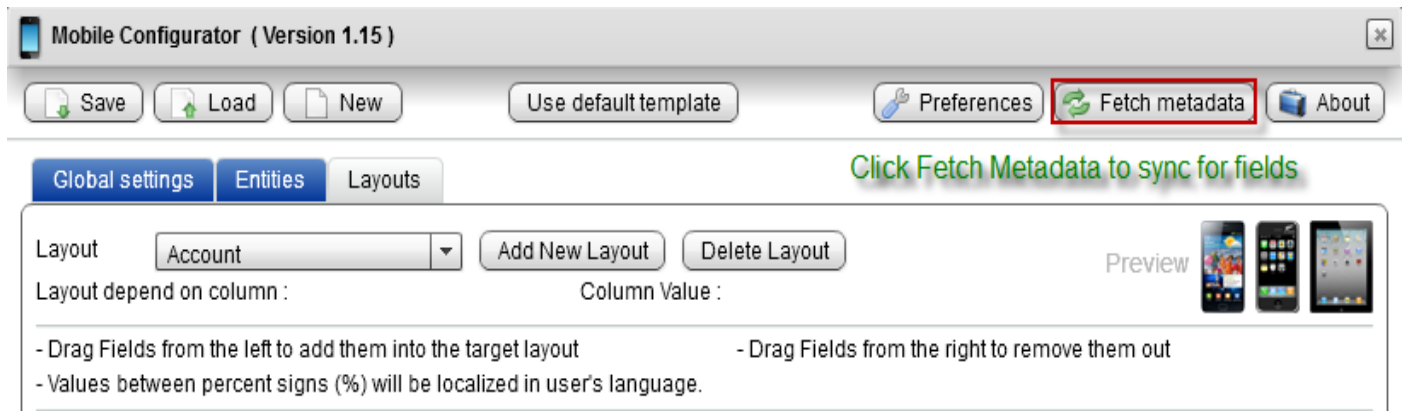


Figure 8-Fetch metadata button

4.3. Choose a template to configure

As starting point you need to add new entity to build your layout. you also can choose between two templates by importing the existing xml in the application – Default and Consumer Goods. The two templates have different entities active and have some different basic layouts. As we continuously improve and enhance the templates more templates will follow and the existing ones will change most likely.

4.3.1. Creating new template

When you finish running application for the first use, the interface will be blank template. To ensure has all fields as Oracle On demand, user need to synchronize with the environment he/she wants to use.

- **Global Settings** - After synchronization completed, user can create a new layout by configuring in *Global Setting* and *Entities* first.



Figure 9-Global settings

- **Entities** have all objects with important settings to configure. Enable the objects that you want to work on then it will appear in Layout for you to add. Layouts cannot be added if the objects are not enabled. User cannot create, update and delete if you disable these checkboxes in entities.

Mobile Configurator (Version 1.15)

Save Load New Use default template Preferences Fetch metadata About

Global settings Entities Layouts

Entity	Enabled	Filter	Create	Update	Delete
Account	☒	Personal	☐	☐	☐
Activity	☒	Personal	☐	☐	☐
Asset	☒	Personal	☐	☐	☐
Campaign	☐	Personal	☐	☐	☐
Contact	☒	Personal	☐	☐	☐
Lead	☒	Personal	☐	☐	☐
Opportunity	☒	Personal	☐	☐	☐
Price List	☐	Personal	☐	☐	☐
Price List Line Item	☐	Personal	☐	☐	☐
Product	☒	Personal	☐	☐	☐
SPRequest	☐	Personal	☐	☐	☐
Service Request	☒	Personal	☐	☐	☐
SPRequestLineItem	☐	Personal	☐	☐	☐
Custom Object 1	☐	Personal	☐	☐	☐
Custom Object 2	☐	Personal	☐	☐	☐
Custom Object 3	☐	Personal	☐	☐	☐
Custom Object 4	☒	Personal	☐	☐	☐
Custom Object 5	☐	Personal	☐	☐	☐

Enable objects to build Layouts

Choose filter by dropping the dropbox

Check Create, Update and Delete checkboxes to enable or disable

Figure 10-Entities interface

- **Layout** is a place that is used to design the layout for each object. User can drag and drop fields into the template so that they can get the xml that matches to their business. In figure 11, the Objects were not enable from the Entities so the screen is blank.

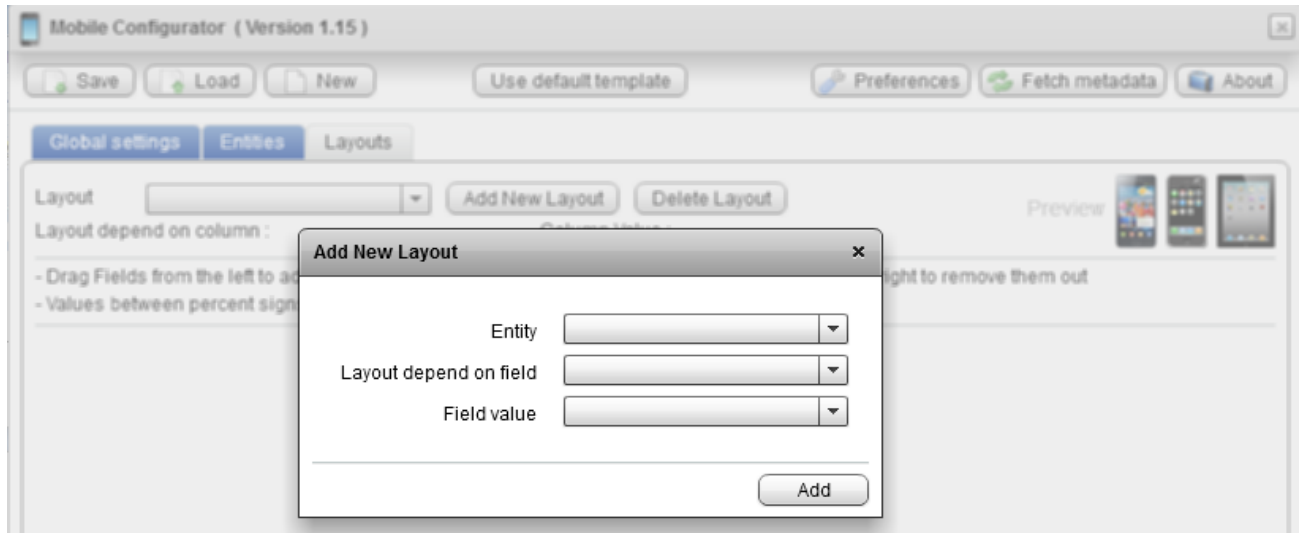


Figure 11-No objects are enable from Entities

This is the example. In figure 12, I enable Account and Activity so now I can new layout for these objects.

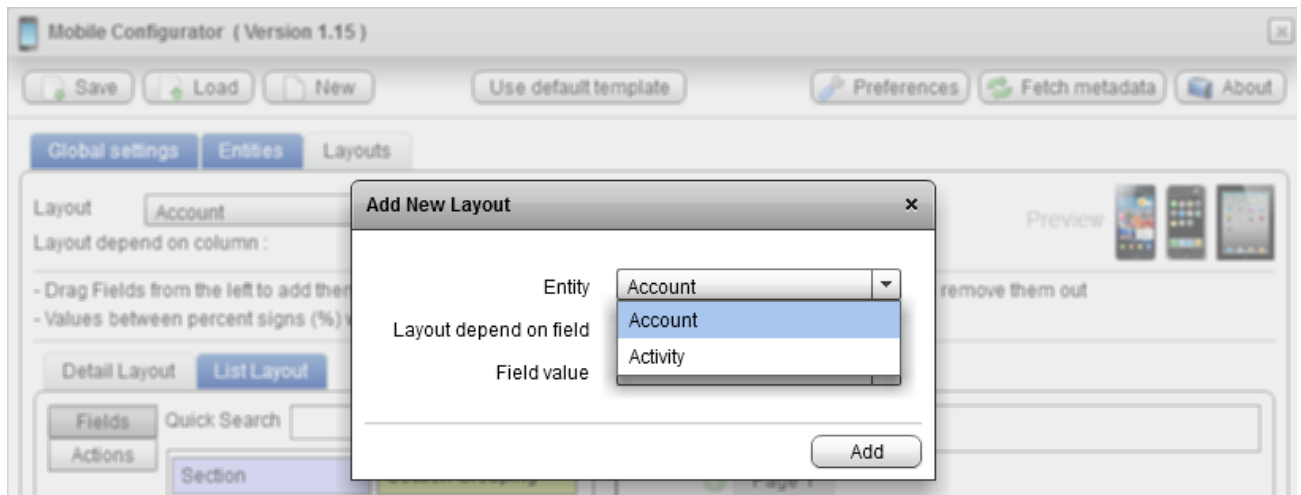


Figure 12-Entities enable (Account and Activity)

- To renew the layout click New button on upper left corner. When the New button is clicked, there will be a message to ask for deletion of old layout template.

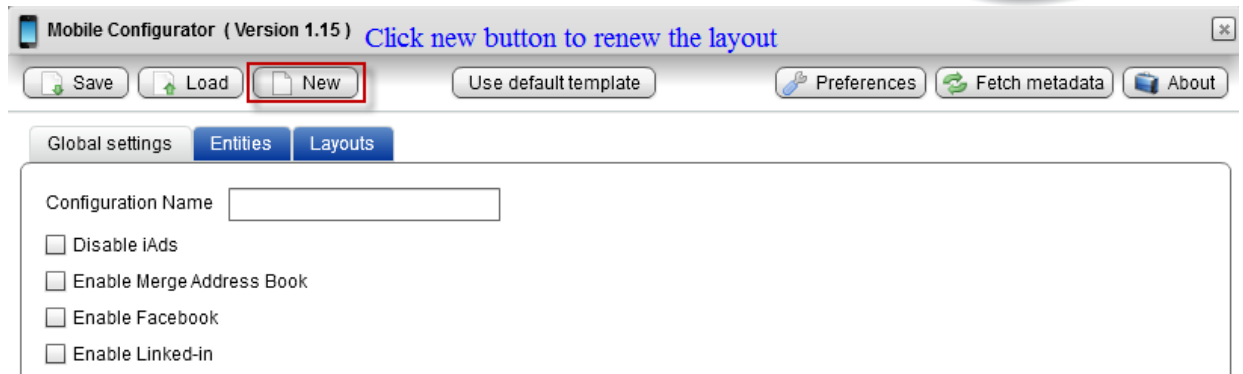


Figure 13-New button for new layout

4.3.2. Choosing Default template

There are four default templates existing in Mobile Configurator. They are:

- iPhone/iPad Default
- iPhone/iPad Consumer goods
- Android Default
- Android Consumer goods

In general consumer goods are considered with Product and Asset so these objects don't have in iPhone/iPad/android Default template.

Follow the steps below to import default template,

1. On Mobile Configurator interface, you can see the Use Default Template button, click it

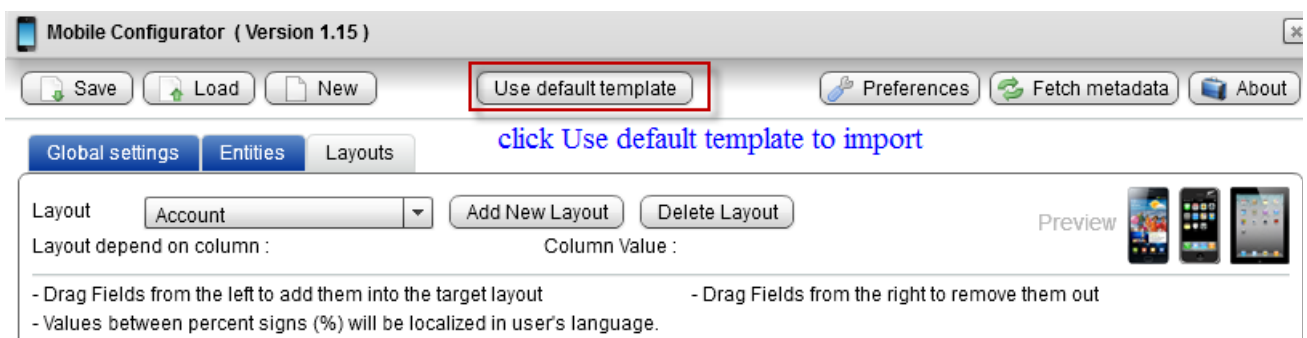


Figure 14-Default template

2. Choose one of Default Templates, Default or Consumer goods

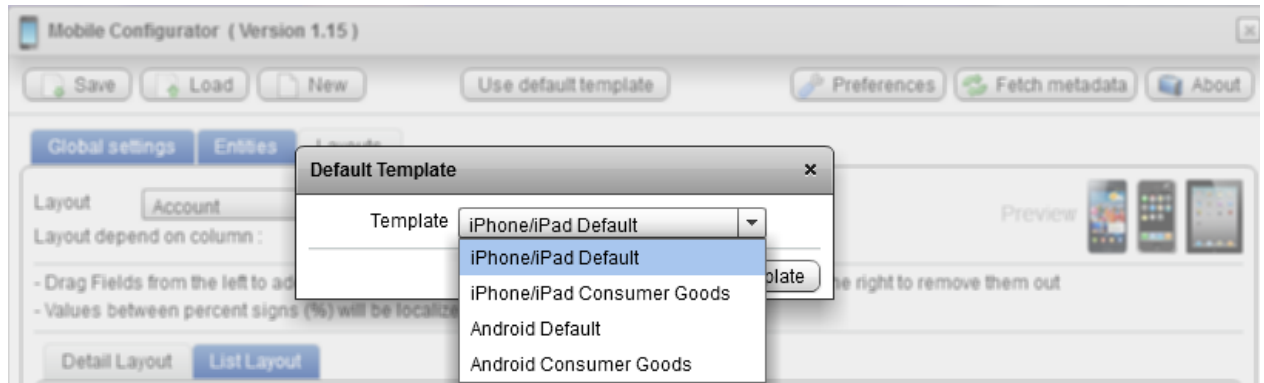


Figure 15-Default template (preview picklist)

3. Click Use this template button to import the template. After the button is clicked, the layout of iPhone/iPad Consumer Goods will display in Layout tab. Click Layout tab to view the objects in order to edit more fields. The default configuration will be configure automatically in Global Setting, Entities and Layouts.

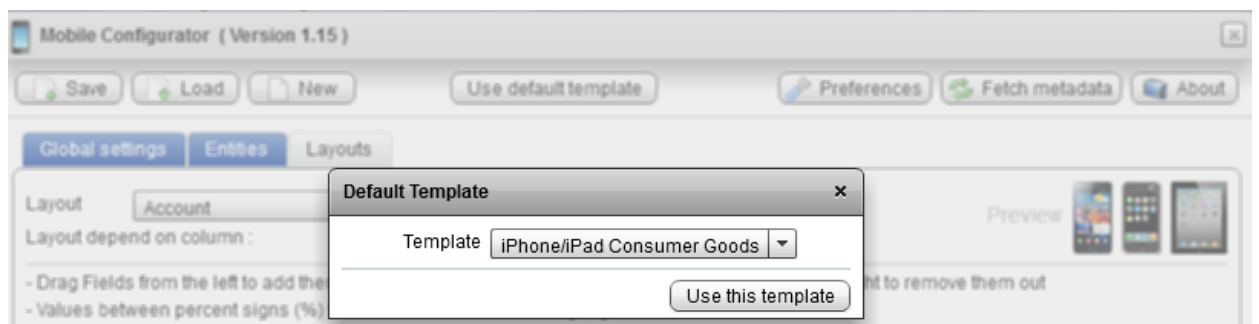


Figure 16-import template button

4.4. Drag and Drop

4.4.1. Detail Layout (Fields)

Drag & Drop fields from the left to the right to add them to the target layout and from the right to the left to remove them. You can also add Sections and section grouping. To Search for a specific field type the name of the field in Quick Search Box above the fields on the left side. To make a field required or read only right-click on the field after adding it to your layout on the right side and choose mandatory or read-only from the context menu.

Mobile Configurator (Version 1.15)

Save Load New Use default template Preferences Fetch metadata About

Global settings Entities Layouts

Layout Account Add New Layout Delete Layout Preview

Layout depend on column : Column Value :

- Drag Fields from the left to add them into the target layout
- Values between percent signs (%) will be localized in user's language.

Detail Layout List Layout to drag and drop fields see this instruction

Fields Quick Search

Actions Clone Log Call Visit Report

%KEY_INFO%

Account Type Location Main Phone # Main Fax # Web Site

%ADDRESS%

Billing Address 1 Billing Zip/Post Code Billing City Billing Country

%ADDITIONAL_INFO%

Priority Industry Public Company

Figure 17-Fields (drag & drop)

4.4.2. Detail Layout (Action buttons)

For each entity / object you have several Action buttons available. To see what actions are available for the chosen entity click on the **Actions** button on the left. Drag & Drop the Action from the left to the right top area to add them to the target layout and from the right to the left to remove them.

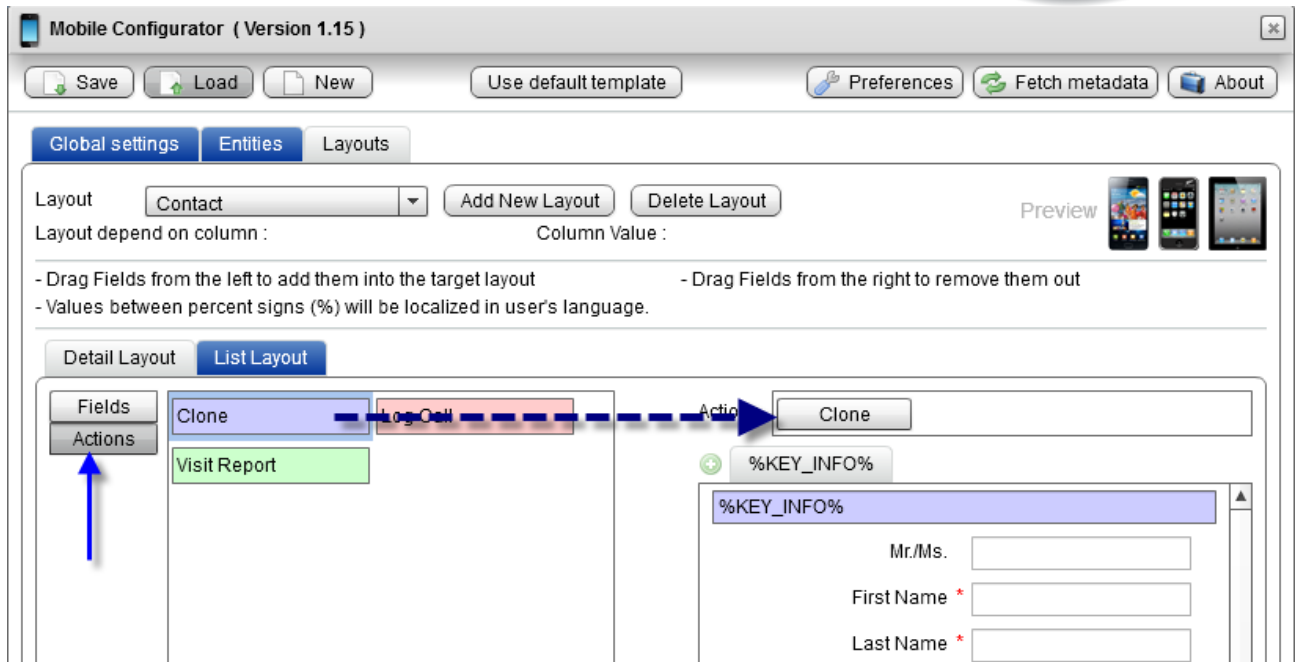


Figure 18-Action button (drag & drop)

4.4.1. Detail Layout (Section and Section grouping)

There are headers called Section and Section Grouping. Drag Section to view your fields with list. Drag Section Grouping to view your fields in group. For section and section grouping is introduced with this sign “%%” to view with any language changes.

Note:

- Section is just a header for a list of fields.
- Grouping section is useful for packing some fields in a single unit - for example you can build Address putting together BillingAddress1, BillingAddress2, BillingCity, BillingCountry

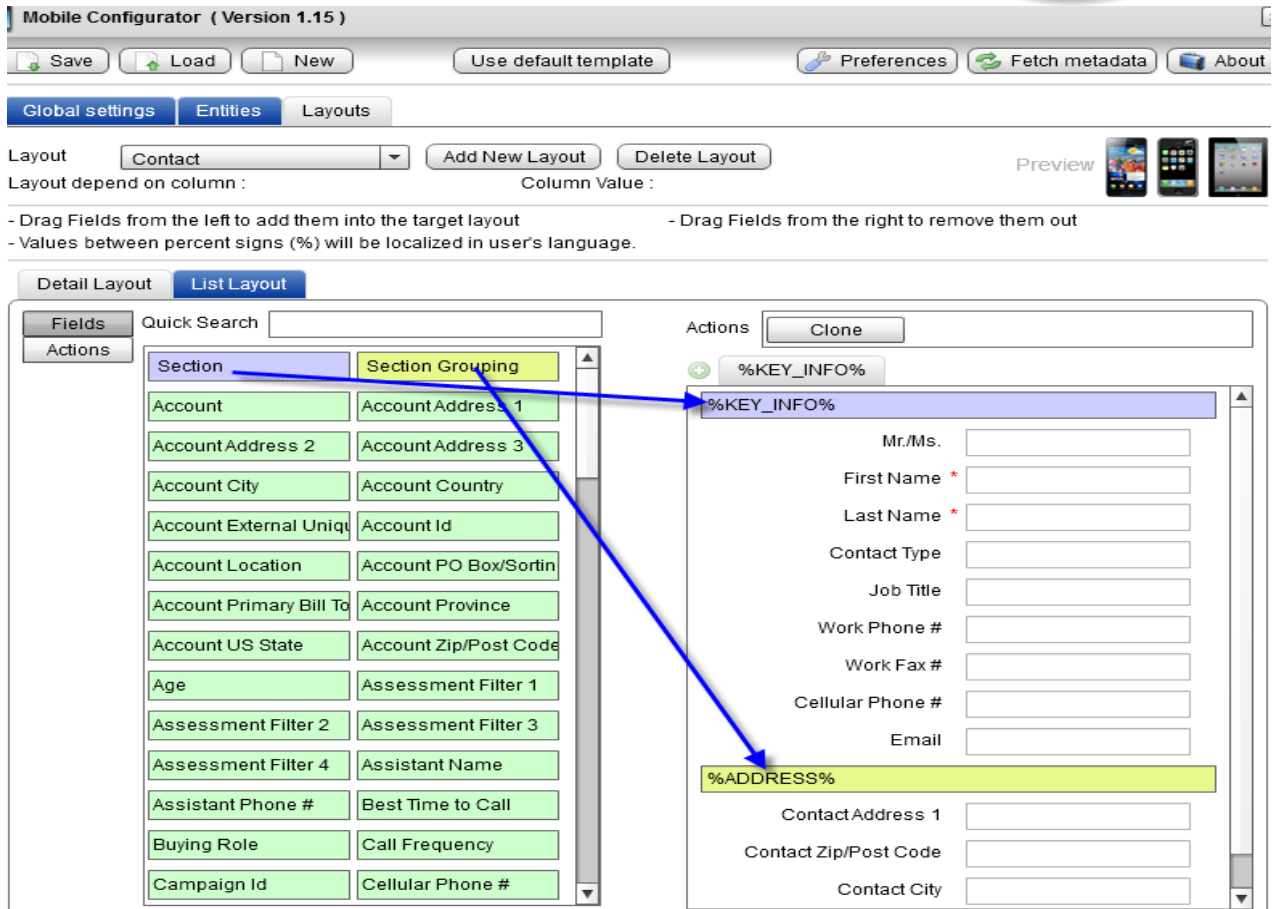


Figure 19-Section and Section grouping

Here is the example of section and section grouping in android. In these screenshots show the differences between section and section grouping.

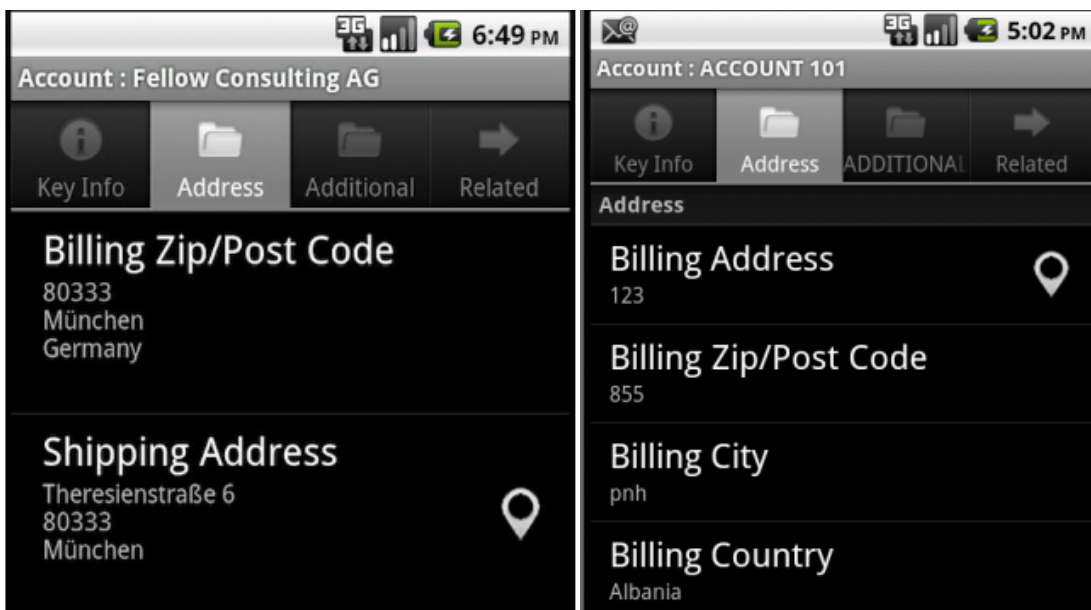


Figure 20-Section grouping

Figure 21-Section

4.5. List Layout

Configuration on List Layout is very important. The records won't view on your device if you don't add layout in List Layout. You can view your records in different ways. There four columns for you to drag and drop the layout according to your demand. They are **Primary text**, **Secondary text**, **Search field** and **Sort field**. More than one fields can be added in Primary Text, e.g. {AccountName} {AccountType}

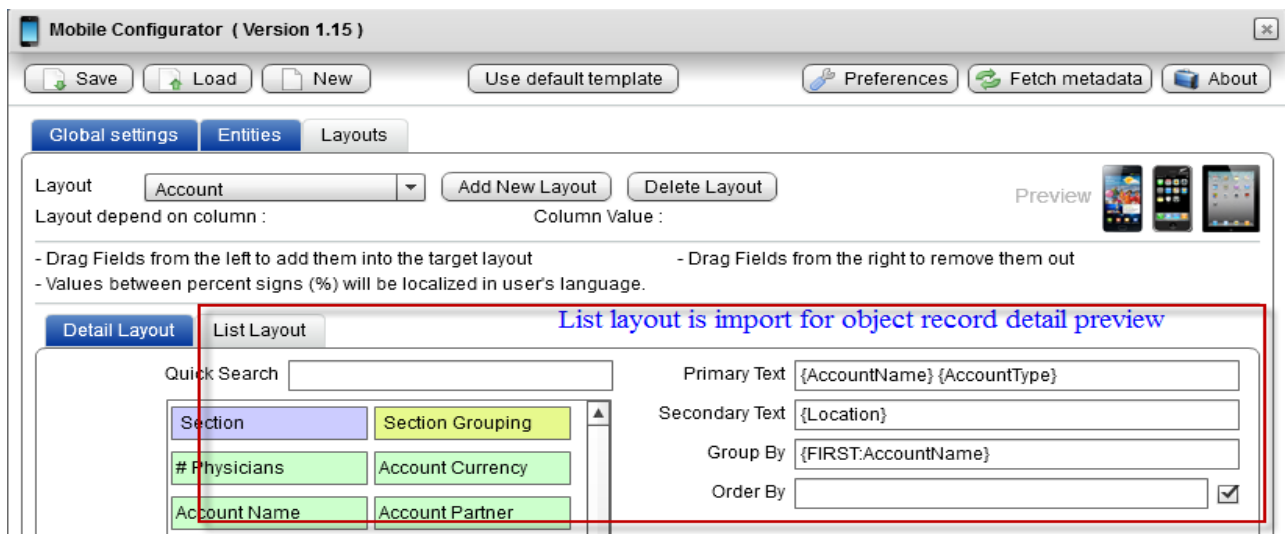


Figure 22-List Layout configuration

4.6. Working with Pages

4.6.1. Add more pages (tabs)

For each entity it is possible to add, rename or delete pages (tabs). The pages are limited to three so user can add only three pages in mobile configurator. The page is generally designed for CRM Gadget for android. Each page can be deleted and renamed. Language translation is introduced by %% sign. For example, %KEY_INFO% will be translated when languages is changed.

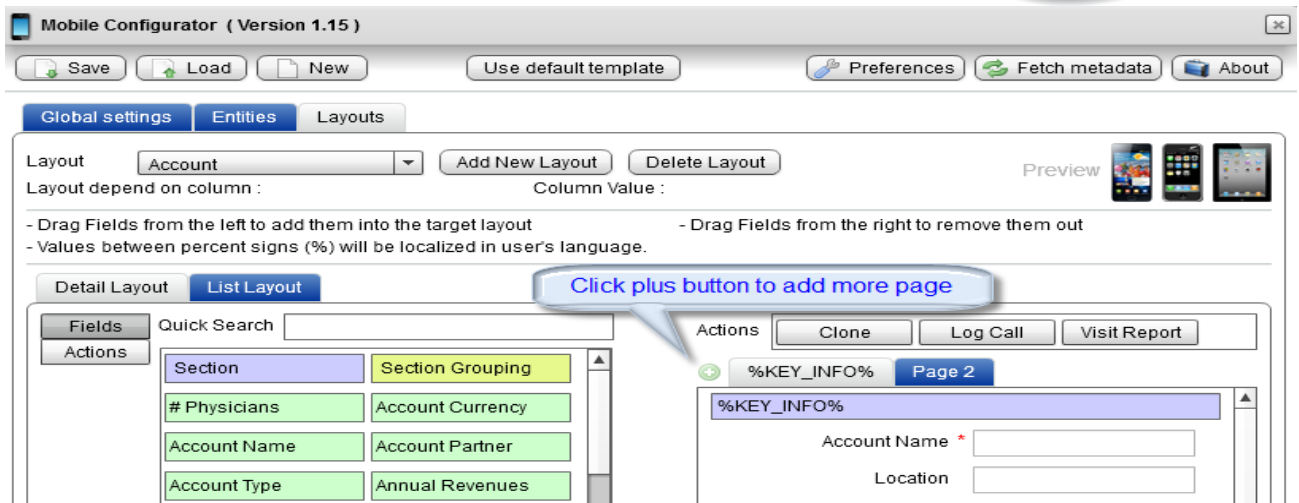


Figure 23-Add more pages

4.6.2. Rename and delete pages (tabs)

Right click on Page to delete or rename it. To rename the page, users can use right the name accompanied by this sign %% is they want to translate the language. Please see the screenshot for example.

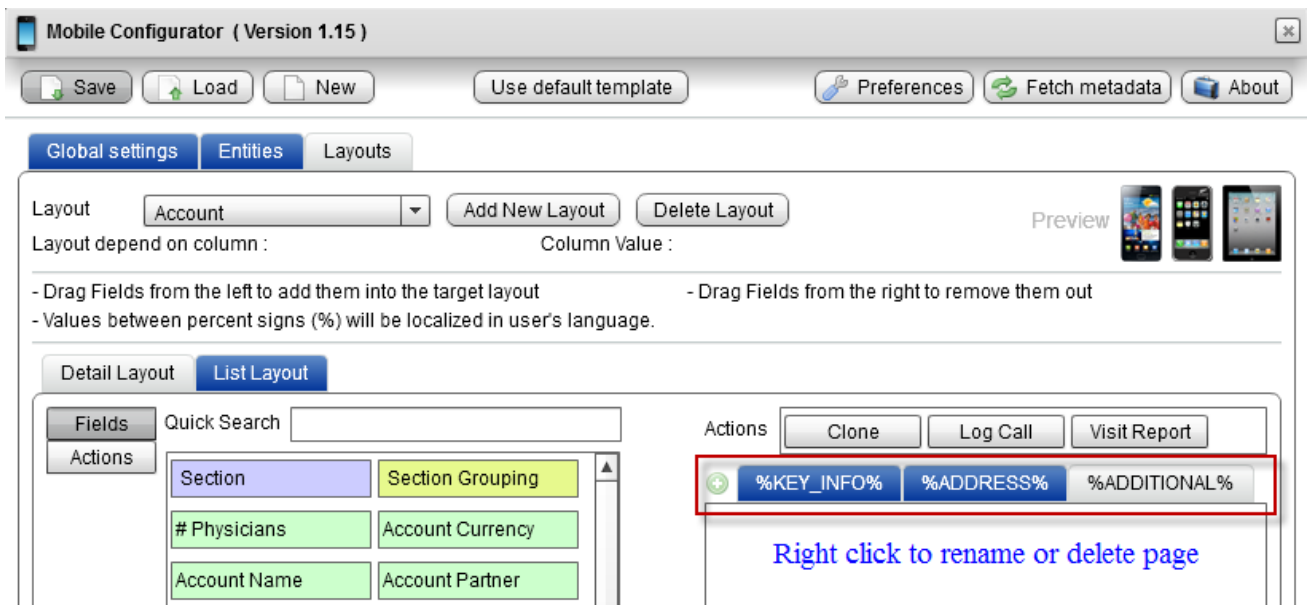


Figure 24-Page (renames & deletes)

4.7. Showing Workspaces

The mobile configurator created the layout for three different devices. You can preview the layout by clicking on the appropriate icons on the upper right side.

- On the left is android

- On the right is iPad
- In the middle is iPhone

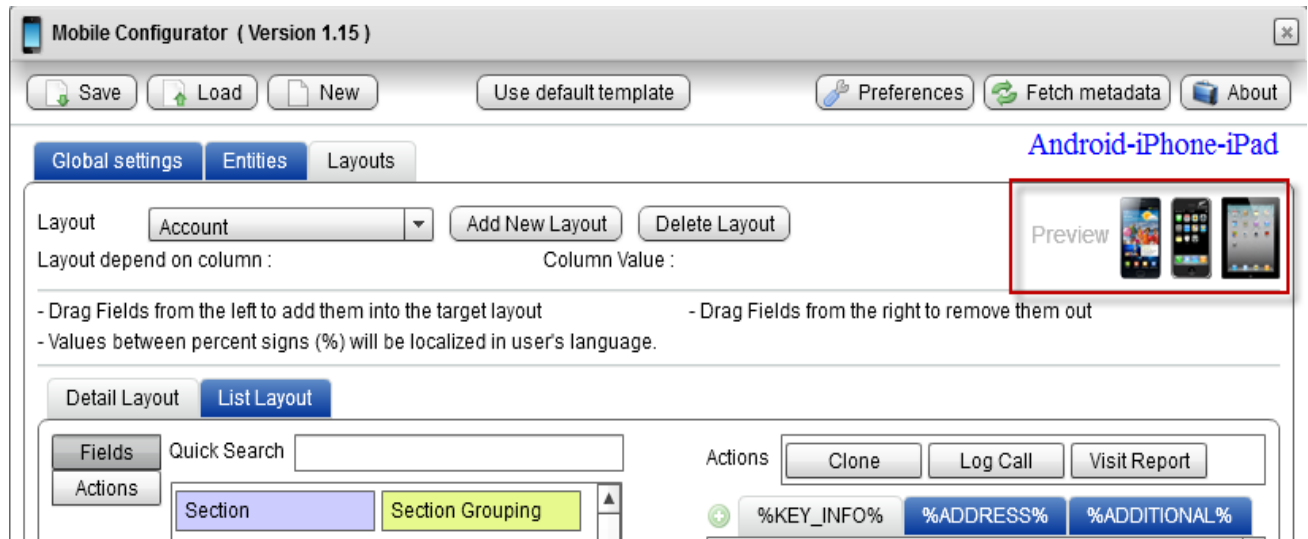


Figure 25-Preview workspaces

4.7.1. Preview workspace on iPad



Figure 26-iPad

4.7.2. Preview workspace on iPhone

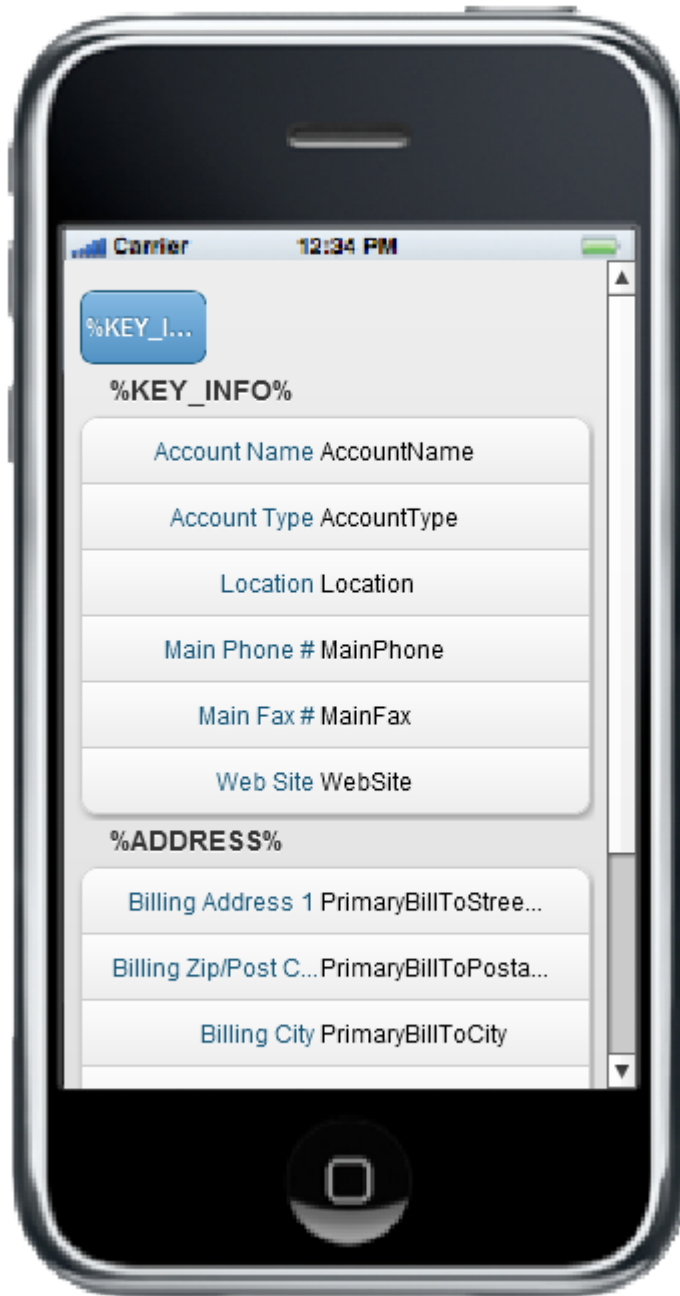


Figure 27-iPhone

4.7.3. Preview workspace on Android

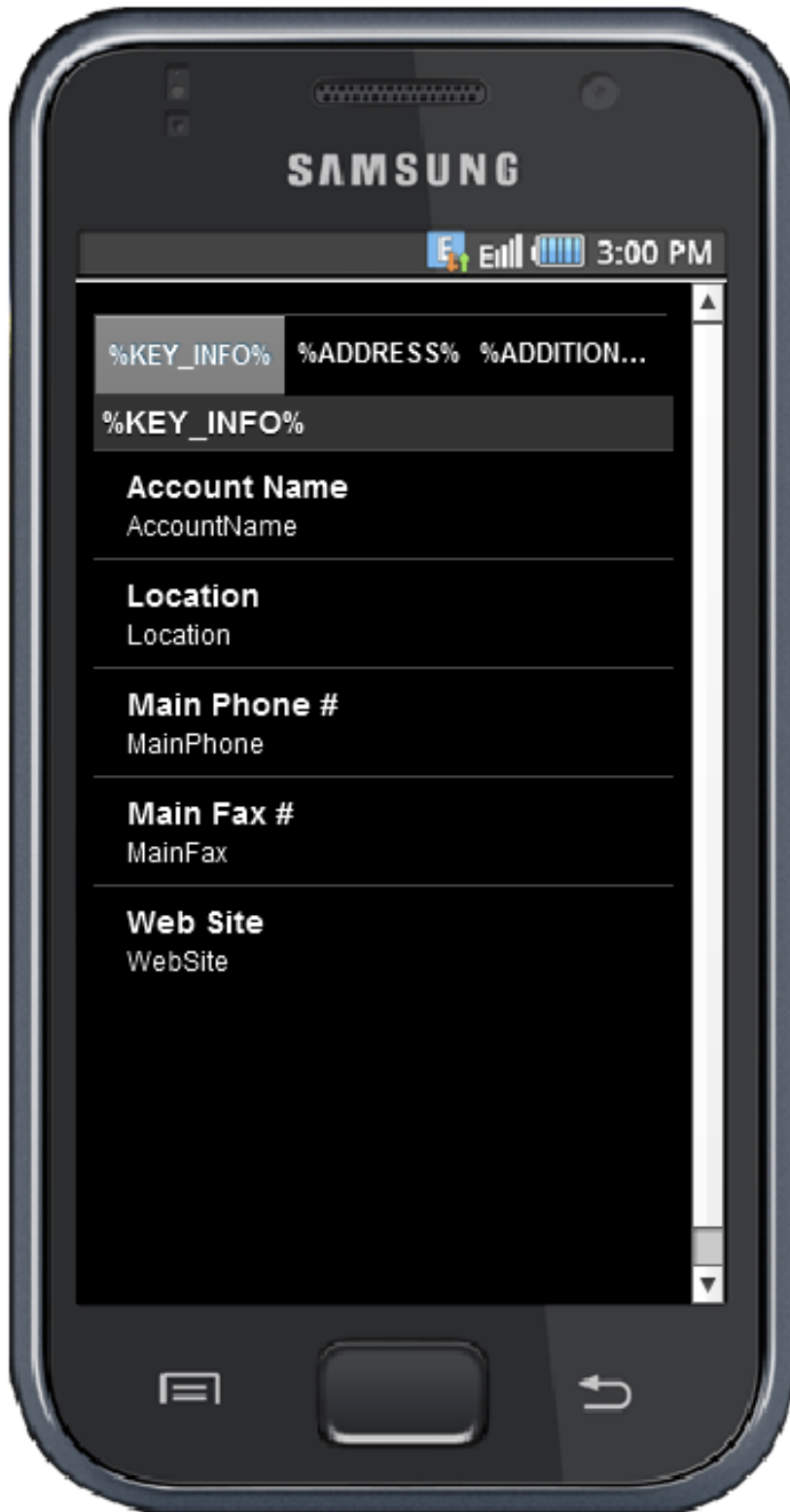


Figure 25-Android

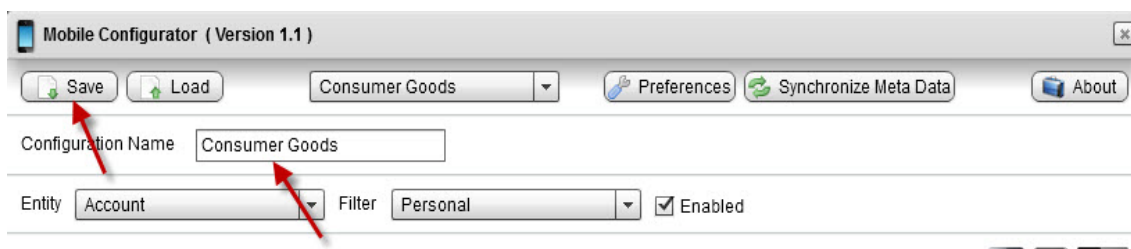
5. Deploying the Customized Template

5.1. Saving the XML File

After you finished the customization you can export it to an XML file and upload it to Oracle CRM on Demand

Follow these steps to export

1. Give your customization an appropriate name
2. Click on Save button



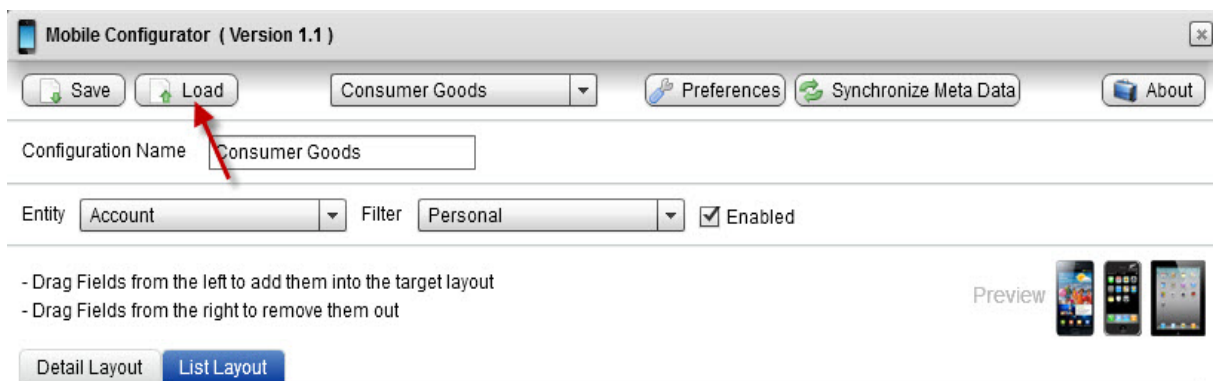
3. Give the XML file a name and choose a folder so you can easily find it again
4. When saving the extension .xml is automatically added

5.2. Loading an existing configuration XML file

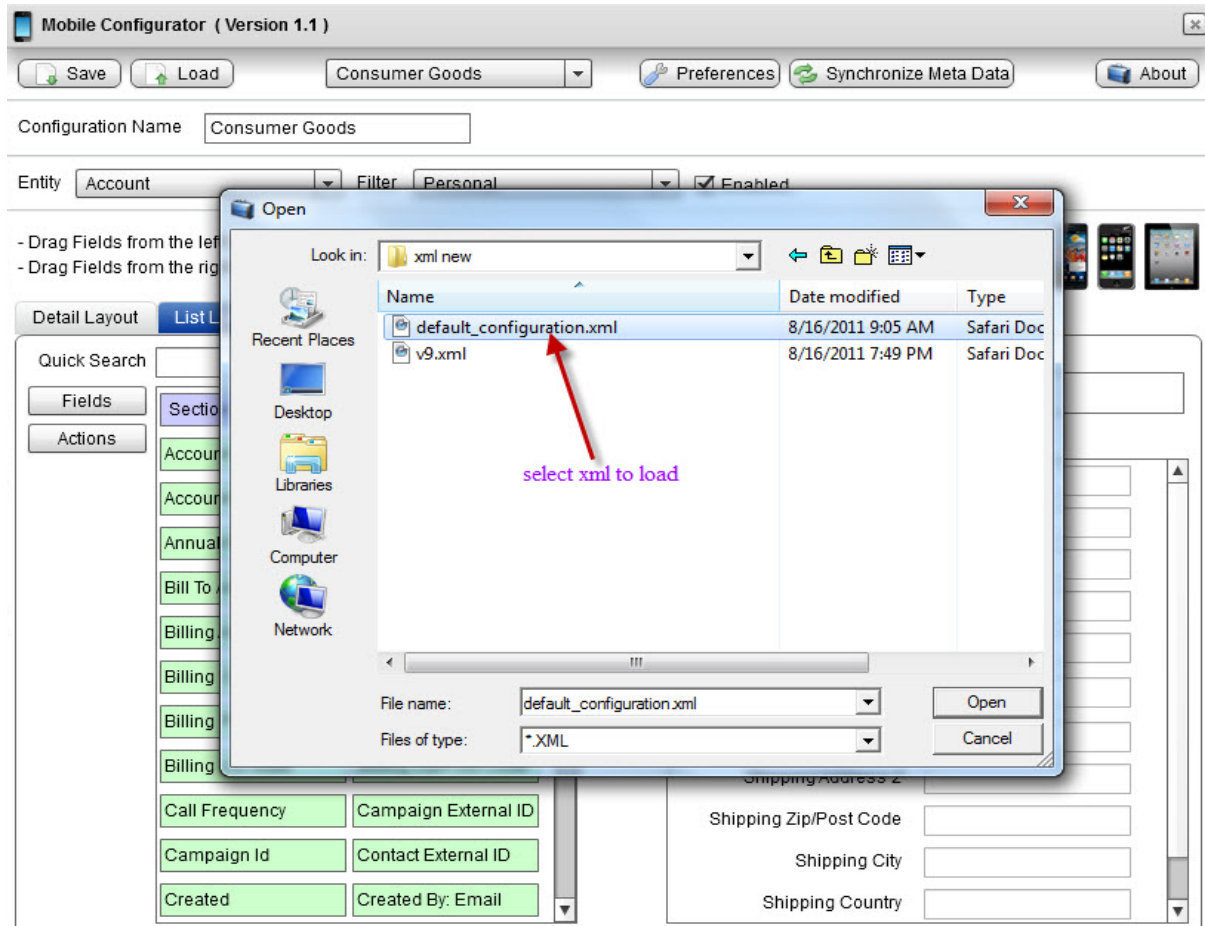
When you want to modify an existing configuration you can load to an existing xml file to the Mobile Configurator.

To do this, follow these steps:

1. click on Load button



2. Find and select your xml and click open



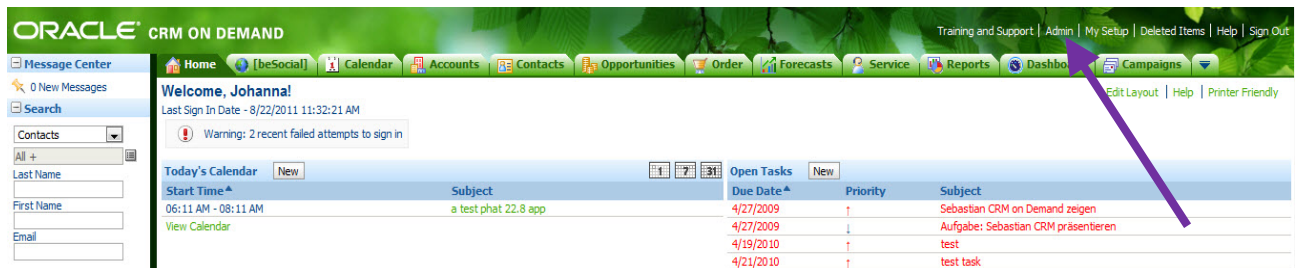
5.3. Uploading the XML File to OOD

In order to deploy your customization to the mobile application you need to upload it to Oracle CRM on Demand. The mobile application checks for a configuration file on each sync and will apply it when it finds a configuration file.

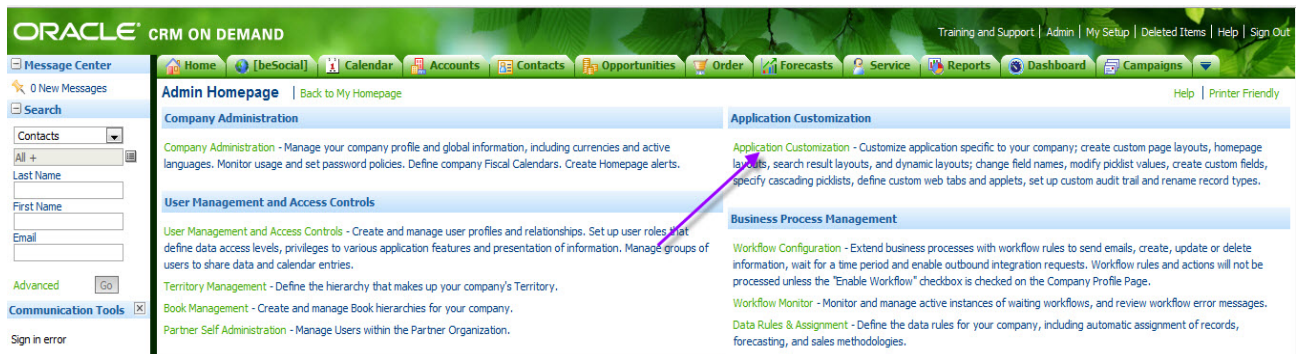
IMPORTANT: For iPhone and iPad devices, the XML must be named “iPad.xml”. For an Android device it must be named “android.xml”.

Steps to upload

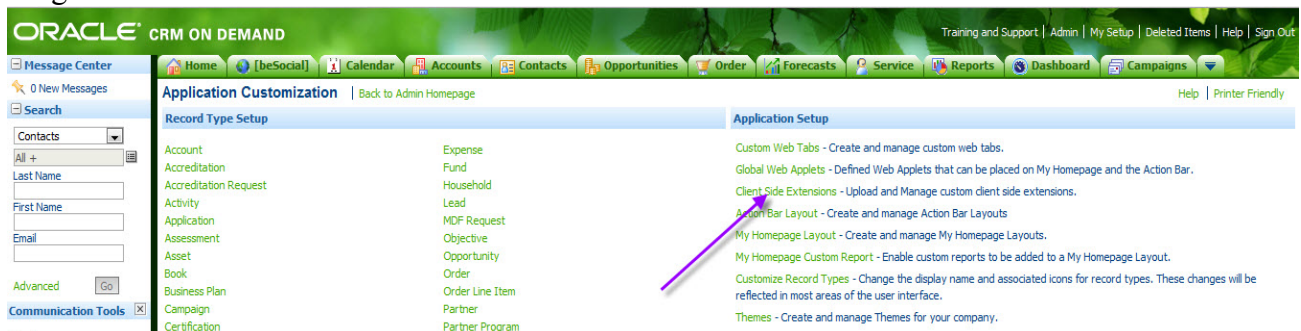
1. go to Admin in OOD



2. go to Application Customization



3. go to Client side extensions



4. If the XML does not exist yet click New

ORACLE CRM ON DEMAND

Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Client Side Extension List | Back to Application Customization

Please note that any Client Side Extensions are the responsibility of the person or persons who created the extension. Oracle Customer Care does not have access to these extensions and as such cannot support the extension or the contents of the files. When creating extensions, keep in mind that Oracle will only be able to support calls to published APIs across different versions of Oracle CRM On Demand.

Securing against web browser based attacks, for example clickjacking, XSS and CSRF, should be considered a requirement when developing extensions and is the responsibility of the person or persons who are creating the extension. We also advise you to remember that Browser Caches are only as secure as the computers and/or devices that are browsing Oracle CRM On Demand.

Client Side Extension List | All Client Side Extensions | Menu | **New**

Name	File	Description	Relative URL	Full URL	Modified By: User Sign In ID	Modified: Date	Created By: User Sign In ID	Created: Date
Edit	ipad	ipad(2).xml (4856 bytes)	../user/content/ipad	https://secure-ausomxds.crmondemand.com/OnDemand/user/content/ipad	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:43 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:41 PM
Edit	ipad.xml	v9.xml (8169 bytes)	../user/content/ipad.xml	https://secure-ausomxds.crmondemand.com/OnDemand/user/content/ipad.xml	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:44 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 12:59 PM
Edit	android.xml	Default_Configurator(new1).xml (9100 bytes)	../user/content/android.xml	https://secure-ausomxds.crmondemand.com/OnDemand/user/content/android.xml	PT-FELLOW-DE-16/JBRAUN	8/22/2011 06:04 AM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 02:26 PM
Edit	gadget.xml	gadget.xml (756560 bytes)	../user/content/gadget.xml	https://secure-ausomxds.crmondemand.com/OnDemand/user/content/gadget.xml	PT-FELLOW-DE-16/JBRAUN	8/5/2011 06:48 AM	PT-FELLOW-DE-16/JBRAUN	8/4/2011 08:41 AM

5. Upload xml for iPad& iPhone

For iPad&iPhone, Name and URL name must be **ipad.xml**. Click save to finish

ORACLE CRM ON DEMAND

Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Client Side Extension Edit | Back to Client Side Extension List

Client Side Extension Details | Save | Save & New Client Side Extension | Cancel

File Information:

File*: v9.xml (8169 bytes) x *click file Attach to upload xml*

MIME Type:

File: Size (In Bytes): 8169

File: Extension: xml

Content Information:

Name*:

URL Name*:

Relative URL: ../user/content/ipad.xml

Full URL: https://secure-ausomxds.crmondemand.com/OnDemand/user/content/ipad.xml

Description:

Additional Information:

Modified: Johanna Braun 8/16/2011 01:44 PM

Created: Johanna Braun 8/16/2011 12:59 PM

* = Required Field

Save | Save & New Client Side Extension | Cancel

6. Upload xml for Android

For Android, Name and URL name must be **android.xml**. Click save to finish

ORACLE CRM ON DEMAND

Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Home | [beSocial] | Calendar | Accounts | Contacts | Opportunities | Order | Forecasts | Service | Reports | Dashboard | Campaigns

Client Side Extension Edit | Back to Client Side Extension List

Client Side Extension Details | Save | Save & New Client Side Extension | Cancel

File Information:

File* Default_Configurator(new1).xml (910) X

MIME Type

File Size (in Bytes) 9100

File Extension xml

Content Information:

Name* android.xml

URL Name* android.xml

Relative URL /user/content/android.xml

Full URL https://secure-ausomxdsa.crmondemand.com/OnDemand/user/cont

Description test

Additional Information:

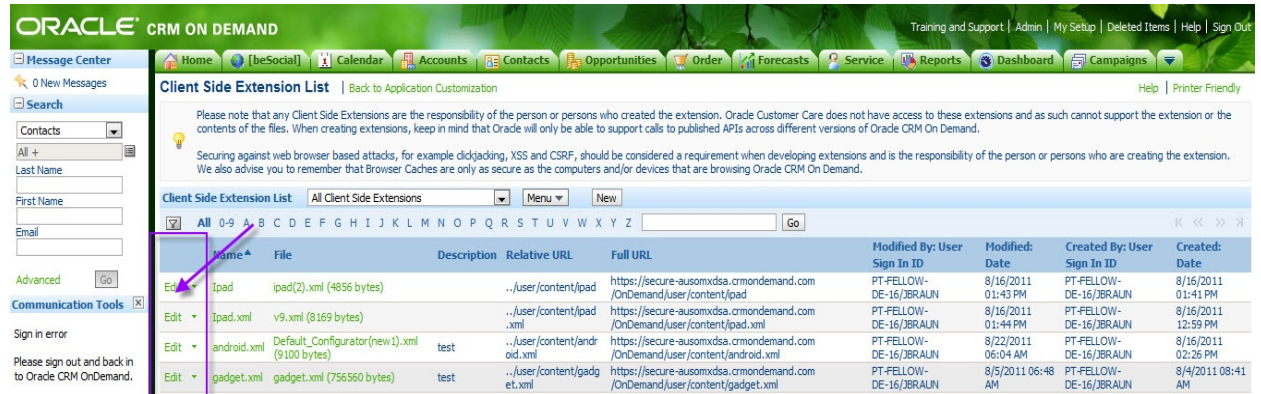
Modified Johanna Braun 8/22/2011 06:04 AM

Created Johanna Braun 8/16/2011 02:26 PM

*= Required Field

Save | Save & New Client Side Extension | Cancel

7. If the XML already exist click Edit and upload the new xml or delete it first
Edit



ORACLE CRM ON DEMAND

Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Home | [beSocial] | Calendar | Accounts | Contacts | Opportunities | Order | Forecasts | Service | Reports | Dashboard | Campaigns

Client Side Extension List | Back to Application Customization

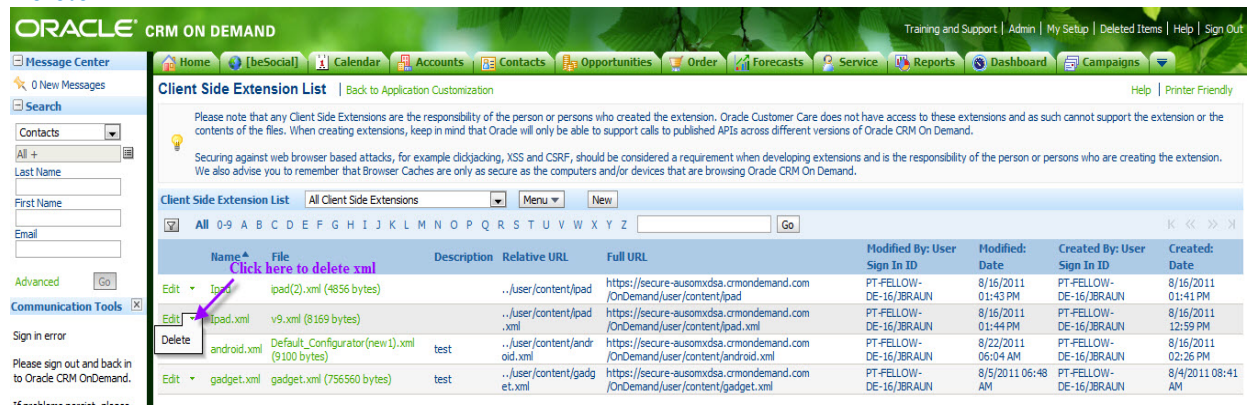
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Edit	ipad	ipad(2).xml (4856 bytes)	../user/content/ipad	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/ipad	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:43 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:41 PM
Edit	ipad.xml	v9.xml (8169 bytes)	../user/content/ipad.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/ipad.xml	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:44 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 12:59 PM
Edit	android.xml	Default_Configurator(new1).xml (9100 bytes)	../user/content/android.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/android.xml	PT-FELLOW-DE-16/JBRAUN	8/22/2011 06:04 AM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 02:26 PM
Edit	gadget.xml	gadget.xml (756560 bytes)	../user/content/gadget.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/gadget.xml	PT-FELLOW-DE-16/JBRAUN	8/5/2011 06:48 AM	PT-FELLOW-DE-16/JBRAUN	8/4/2011 08:41 AM

Delete



ORACLE CRM ON DEMAND

Training and Support | Admin | My Setup | Deleted Items | Help | Sign Out

Home | [beSocial] | Calendar | Accounts | Contacts | Opportunities | Order | Forecasts | Service | Reports | Dashboard | Campaigns

Client Side Extension List | Back to Application Customization

Please note that any Client Side Extensions are the responsibility of the person or persons who created the extension. Oracle Customer Care does not have access to these extensions and as such cannot support the extension or the contents of the files. When creating extensions, keep in mind that Oracle will only be able to support calls to published APIs across different versions of Oracle CRM On Demand.

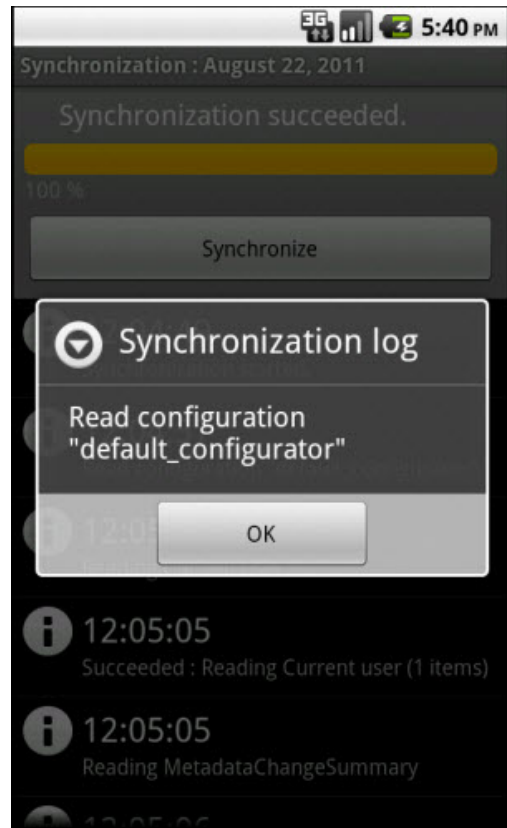
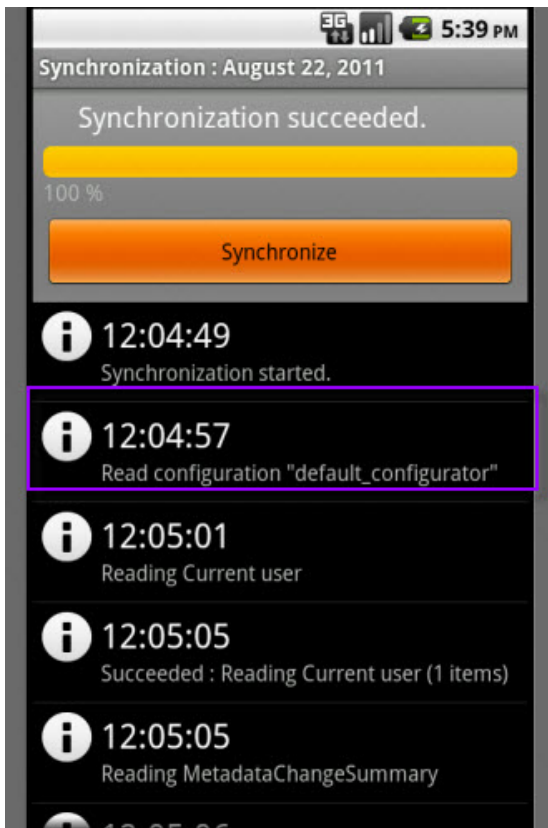
Securing against web browser based attacks, for example clickjacking, XSS and CSRF, should be considered a requirement when developing extensions and is the responsibility of the person or persons who are creating the extension. We also advise you to remember that Browser Caches are only as secure as the computers and/or devices that are browsing Oracle CRM On Demand.

Client Side Extension List | All Client Side Extensions | Menu | New

Name	File	Description	Relative URL	Full URL	Modified By: User	Modified: Date	Created By: User	Created: Date
Edit	ipad	ipad(2).xml (4856 bytes)	../user/content/ipad	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/ipad	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:43 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:41 PM
Edit	ipad.xml	v9.xml (8169 bytes)	../user/content/ipad.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/ipad.xml	PT-FELLOW-DE-16/JBRAUN	8/16/2011 01:44 PM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 12:59 PM
Edit	android.xml	Default_Configurator(new1).xml (9100 bytes)	../user/content/android.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/android.xml	PT-FELLOW-DE-16/JBRAUN	8/22/2011 06:04 AM	PT-FELLOW-DE-16/JBRAUN	8/16/2011 02:26 PM
Edit	gadget.xml	gadget.xml (756560 bytes)	../user/content/gadget.xml	https://secure-ausomxdsas.crmondemand.com/OnDemand/user/content/gadget.xml	PT-FELLOW-DE-16/JBRAUN	8/5/2011 06:48 AM	PT-FELLOW-DE-16/JBRAUN	8/4/2011 08:41 AM

6. Verify the configuration on the mobile device

In order to verify your customization you need to synchronize and check the sync log. The message in sync log shows **Read configuration** "Name of xlm you deployed"
Here is example in Android:



Others

For any feedback please contact: Daniel.Jordan@fellow-consulting.de